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ABSTRACT

This report revises and updates environmental trends that affect present and future planning and assessment at Georgia State University (GSU). The purpose of this environmental analysis is to determine the major trends in the environment, the implications of these trends for higher education and for the institution, and significant opportunities and potential problems that may arise in the context of these trends and their implications. The major environmental areas that are identified and discussed are the school's macroenvironment (including demographic, cultural, technological, economic, and political forces), internal environment, market environment, public environment, and competitive environment. Information from national, regional, and state sources, as well as from reports issued as a part of the ongoing program of institutional research at GSU are used in the analysis. The report concludes that GSU is in an excellent position to successfully meet the potentially difficult problems facing higher education during the 1990s. Contains 15 references. (GLR)

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An Environmental Analysis: Issues and Trends for Planning and Assessment

Institutional Research Report No. 90-21

by

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and
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Office of Institutional Research
Georgia State University
April 1990

Abstract

The Board of Regents of the University System of Georgia at its Dec. 13, 1989, meeting approved the Policy on Planning and Assessment (Section 209). The policy states that "each institution shall have a plan, submitted to the Chancellor's office, which will contain the institution's current goals and priorities, a summary of significant assessment results and associated improvement objectives, and action plans by which institutional priorities, including improvements in effectiveness, will be achieved." It is the purpose of this study to support this effort by supplying relevant and critical information about the environment within which Georgia State University must plan. This report presents and analyzes current environmental trends that affect present and future planning and assessment at Georgia State University. It is a revision and update of a 1986 report on environmental analysis. Major environmental trends and their implications were identified as:

- Macroenvironment: Georgia State University can take advantage of its location in an urban area experiencing dynamic employment and population growth to help offset the potential declining enrollment of traditional college-age students. Georgia State University can benefit from a nationwide interest expressed by government and business leaders in quality education as a fundamental component in strategies to compete in an international economy dependent upon the development of increasingly advanced technology. Higher education is also being viewed as having an integral role in fostering local and state economic development.

- Internal environment: Georgia State University's public image does not reflect its size, quality or influence. Current planning and assessment efforts provide an opportunity to identify both its strengths, weaknesses and untapped opportunities and to determine the extent to which its mission is relevant to the changing environment and is reflected in its public image.

- Market environment: Georgia State University traditionally draws students heavily from the northeast metropolitan Atlanta area. The potential for expanding this market exists through improved retention and the use of satellite locations and recruiting in areas where it is traditionally weak, such as east Cobb, north Fulton and north DeKalb counties. Scholarships and other incentives are a possible way of recruiting beginning students that do not currently seriously consider enrolling.

- Public environment: The strong emphasis from the State on the need to evaluate and assess institutional effectiveness, educational outcomes, and program efficiency is unlikely to abate. This initiative can be used as an opportunity to explore goals and objectives, assess its educational results, and make plans and improve programs based on these assessments. The University is likely to continue to have to compete vigorously for its fair share of public funds.

- Competitive environment: The Atlanta metropolitan area supplies more than one-third of the University System of Georgia students. Although Georgia State University dominates system enrollment from this area, other system institutions draw heavily from this market. Although it should be wary of increasing competition from these institutions, it can maintain its competitive advantage by enhancing its public image, increasing its sensitivity to the needs of its constituents, and by forging strong ties to business and government constituents.

Georgia State University is in an excellent position to navigate successfully the potentially difficult course facing higher education during the 1990s. Historically it has been an inexpensive, comprehensive urban institution providing a variety of superior, flexible academic programs. The University's new administration is reexamining and formulating goals to use in preparing and developing the strategic plan which will possibly provide new directions. Because it is the only such institution in the University System of Georgia, Georgia State University is in a unique position to serve the needs of both traditional students and older, nontraditional working students in the Atlanta metropolitan area. By becoming more sensitive to changing environmental trends that affect its student, business, political and community constituencies, the university can incorporate environmental issues into its strategies and plans. As such, it can better orchestrate its own future, carefully balancing environmental constraints and market opportunities with institutional values and goals.

TABLE OF CONTENTS

INTRODUCTION 1
Plan of the Study 3
Review of Literature 3

ENVIRONMENTAL ANALYSIS 6
Macroenvironment 6
Demographic 6
Cultural 12
Technological 16
Political 21
Internal Environment 25
Market Environment 31
Public Environment 37
Competitive Environment 41

Summary 48

Glossary 50

Sources of Information 51

References 55

An Environmental Analysis: Issues and Trends for Planning and Assessment

Colleges and universities have been experiencing demands for rapid changes. Increased public scrutiny, technological developments and scarce funding sources are causing increased stress on higher education. Many adults are entering or reentering higher education for job retraining and completion of education goals. Higher education institutions are having to cope with shifting demographic factors such as the shrinking pool of traditional college-age students and increasing proportions of minority and part-time, employed students.

Universities' environments are always changing. In a time of major demographic, cultural, technological and economic change, strategies for institutional adaptation are needed. Current environmental trends will affect present and future planning at Georgia State University (GSU). Yet, these trends are likely to affect GSU differently from the way most other colleges and universities are affected.

The purpose of this environmental analysis is to answer the following questions (Kotler and Murphy, 1981):

1. What are the major trends in the environment?
2. What are the implications of these trends for higher education and for the institution?
3. What significant opportunities and potential problems may arise in the context of these trends and their implications?

The analysis is intended to provide needed background information for academic planning.

The context of this environmental analysis is provided by the Board of Regents of the University System of Georgia's Policy on Planning and Assessment approved at its Dec. 13, 1989, meeting.

> Each institution shall have a plan, submitted to the Chancellor's office, which will contain the institution's current goals and priorities, a summary of significant assessment results and associated improvement objectives, and action plans by which institutional priorities, including improvements in effectiveness, will be achieved [209.01].
>
> Each institutional plan will describe the planning structure and process by which institutional priorities are set, systematic assessment of institutional effectiveness is conducted, and the results of assessment are used to achieve institutional improvement. The faculty of each institution shall be involved in developing the plan and shall be included in the structure by which the plan is implemented [209.02].
>
> Each institution shall link its major budget allocations and other major academic and administrative

decisions to its planning and assessment process [209.03].

Assessment procedures may differ from institution to institution, but each program shall include the assessment of: basic academic skills at entry, general education, specific academic program areas, and all academic and administrative support programs [209.04].

GSU's 1988 Institutional Self-Study Report provides the following statement of purpose:

> Georgia State University promotes the advancement of knowledge through excellence in teaching, research, and public service. The University meets the need for a broad range of educational opportunities in the international atmosphere of the largest population center in Georgia. This location affords students the opportunity to participate in a thriving artistic, economic, scientific, and social learning laboratory. The University serves individual students, other institutions of higher learning, social and government agencies, and a society at large in a creative climate of academic freedom and responsibility. Thus, the University provides direction and leadership by extending the boundaries of knowledge through research, teaching, and scholarly activity.

The Self-Study presents 10 objectives for GSU for the 1990s:

1) Improvement of the quality of education in all programs.
2) Implementation of programs to meet the needs of students and community in a rapidly changing society.
3) Continuation of curriculum evaluation with appropriate faculty involvement to facilitate changes needed to meet programmatic needs.
4) Development and implementation of strategies to improve instruction and to promote faculty development.
5) Responsiveness to the public service and continuing education needs of the city and the state.
6) Increased emphasis on student development in terms of leadership skills, co-curricular activities, and interaction with faculty and staff.
7) Development of a sense of loyalty and support on the part of graduates of the University.
8) Increased interaction between the University and the local, state, and federal government agencies; the business community; and the communications network.
9) Focus on managerial responsibility for fiscal and physical resources in order to maximize the effective use of these resources.
10) Recognition that the changing nature of society, student population, community needs, and advances in research and

technology will require a posture of adaptation and interaction with future forces.

Plan of the Study

This report is a revision and updating of the 1986 analysis (Jean, 1986). Based upon a review of the literature, the most salient environmental trends that are expected to impact GSU in the future are presented. The analysis of environmental trends is divided into five sections: 1. macroenvironmental (demographic, cultural, technological, economic and political); 2. internal environment; 3. market environment; 4. public environment; and 5. competitive environment. Each section is introduced by a brief overview based on the trends, implications, significant opportunities and potential problems identified in the analysis. The sources of information that provide the basis for the analysis are listed at the end and are classified according to each section. Information has been derived from national, regional and state sources as well as from reports issued as a part of the ongoing program of institutional research at GSU.

Review of Literature

Ideas developed for private concerns have been adapted to apply to institutions of higher education. One of these ideas has been strategic planning in academic administration (Cope 1981; Keller, 1983; Kotler and Murphy, 1981; Morrison, Renfro and Boucher, 1984). Adopted from business management, this planning or strategy is entrepreneurial in flavor. The corporate literature on planning stresses the active linkage of organizational structure, resources and values with the need to recognize and adapt to changing environmental conditions and competitive forces (Hosmer, 1982; Steiner, 1979). This approach to planning stresses the importance of gaining a competitive advantage by attempting to orchestrate the future for its organization, rather than by merely projecting the future and then responding to it (Mingle, 1981).

Implicit in this planning approach is the environmental analysis. Keller describes how an environmental analysis fits into the development of an academic plan (1983, p. 152). The general process of an academic strategy infuses an awareness of future environmental threats and opportunities into present-day decision-making to increase an organization's capacity to achieve institutional values, goals and objectives (Cope, 1981; Drucker, 1974; Kotler and Murphy, 1981).

Keller states that the most important contribution of an academic strategy to organizational decision-making is that it "looks outward and is focused on keeping the institution in step with the changing environment" (1983, p. 145). The Southern Association of Colleges and Schools (SACS) Criteria for Accreditation (1984) supports this perspective. The Criteria requires that institutions assess their effectiveness. Institutions are expected to supplement their traditional focus on inputs and process with

a focus on educational and other institutional outcomes in a process of self-assessment.

This emphasis on institutional effectiveness, assessment and outcomes requires a planning and evaluation process that involves sensitivity to both internal and external environmental factors influencing academic decision-making (Ewell, 1983). The University of Texas System, in its 1984 Planning Guidelines, supports its strategic planning process with the rationale that it is important to "keep the organization fine-tuned to the changes in its environment, develop proactive strategies, and preserve its distinctive strengths" (p. A.6.4). The University of Texas at Arlington, in its Manual for Institutional Self-Study (1984), cites as a planning goal the need to increase institutional "responsiveness to the opportunities and challenges which are generated by conditions and constituencies beyond the campus. An analysis of conditions beyond the campus should be conducted in order to make systematic and well-informed assessment of trends and circumstances that will affect the institution" (p. 50). According to that self-study, "strategic plans use external and internal analyses to discover strengths, weaknesses, constraints and opportunities and attempt to match the institution . . . with its environment" (p. 50).

The use of an external or environmental analysis as an integral component of academic planning has been frequently suggested by scholars in higher education management (Cope, 1981; Keller, 1983; Kotler and Fox, 1985; Kotler and Murphy, 1981; Morrison, Renfro and Boucher, 1984). Morrison, Renfro and Boucher (1984) suggest "an environmental scanning model" that as a first step uses an in-house, interdisciplinary scanning committee composed of key administrators and faculty to develop a taxonomy of social, economic, legislative and technological environmental issues. The environmental scan begins with information gathering about the external environment through various sources of newspapers, journals, fact books, and opinions of experts and faculty. The committee can then use probability-impact charts to determine the likelihood that a trend will continue and the extent of its possible impact on the institution. Next, more sophisticated forecasts of the trends and issues identified by the committee can be employed according to time and cost constraints. Yet, as Cope (1981) cautions, when dealing with predicting the future, one should consider degrees of relative probability rather than certainty or inevitability. The assignment of a probability to a trend is ultimately a matter of judgment, based on weighing known information and cross-checking with expert opinion.

In addition to selecting the techniques appropriate for an environmental analysis, it is also highly important for an institution to determine the scope of the analysis. Cope (1981) suggests categorizing environmental trends and issues according to four dimensions: economic, social, technological and political. The University of Minnesota's scanning taxonomy includes political, economic, social/lifestyle, technological and demographic factors classified by level of influence such as the institution, system,

state, nation and world (Morrison, Renfro and Boucher, 1984). The scope of the environmental analysis should, however, be limited to the "interesting future" for which it is practical to plan or to act in the present or in the foreseeable future (Morrison, Renfro and Boucher, 1984).

Another way to determine the scope of the environmental analysis is to consider the environment in terms of the immediate environment, about which an institution has some measure of control and influence, and the macroenvironment (Kotler and Fox, 1985). The macroenvironment represents the fundamental societal forces (demographic, economic, ecological, technological, political and cultural) that lie outside the influence of any educational or specific organization. Kotler and Murphy (1981) categorized the scope of the environmental analysis into the following factors (p. 473):

- internal environment (board of directors, administrators, faculty and staff);
- market environment (traditional students, nontraditional students, alumni, sources of funds, employees and graduate schools);
- public environment (financial, media, government, activist, local and general public);
- competitive environment (direct, type and generic); and
- macroenvironment (demographic, economic, technological, political and cultural).

Trends and issues identified in each category can be understood in the context of environmental threats and market opportunities. Environmental threats have the potential of leading to organizational stagnation or decline, or to program elimination. They can be evaluated according to their potential intensity of impact and probability of occurrence. Market opportunities are areas for potential action in which an organization may have or may want to develop a competitive advantage. Market opportunities can be evaluated according to their potential effectiveness relative to institutional goals and the probability of success.

The University of Louisville further refines the concept of an opportunity-threat matrix. In that university's External Environmental Analysis (1983), the various external forces affecting the university are designated as either threats or opportunities or both. Each threat or opportunity is then rated on a numerical scale such that 0 = neutral, 1 = marginal, 2 = significant, and 3 = exceptional opportunity or extreme threat. The extent to which quantifiable scales are employed to measure environmental effects depends on the cost and availability of time and on the receptivity and disposition of institutional leadership.

As Keller (1983) cautions, every institution is unique and will benefit from devising its own approach for developing an environmental analysis. The environmental analysis designed for GSU was adapted from the related literature but was tailored to the university's needs.

ENVIRONMENTAL ANALYSIS

Macroenvironment

The macroenvironment represents the fundamental underlying forces (demographic, cultural, technological, economic and political) that shape society, its individuals and its organizations. The decreasing birthrate following the post-World War II "baby boom" resulted in declining enrollments which moved through elementary and secondary schools during the 1970s and early 1980s. The anticipated decrease in the 18- to 24-year-old population is expected to be tempered in the Atlanta metropolitan area due to population and employment growth typical of the Southeastern phenomenon. GSU will be able to take advantage of its location to partially offset the declining enrollments of traditionally aged college students.

GSU and higher education in general can benefit from a national interest in quality education as a fundamental component in helping the United States to compete in an international economy dependent upon the development of increasingly advanced technology. Recent prestigious national reports calling for educational reform are prompting many colleges and universities to find ways to measure student learning, to revise curricula in order to reflect the need for basic skills as well as specialized coursework, and to participate in programs with business and government in order to foster economic development. If GSU remains sensitive to those changing environmental forces, it will be in a better position to satisfy the needs of the educational and community constituents that it serves. Supporting items of information pertaining to macroenvironmental trends and implications follow.

Demographic

Major Trends

- Due to expected continuing low birthrates, the U.S. population is expected to grow only 7.1 percent from 1990 to 2000, according to U.S. Census Bureau figures.

- The decline of the birthrate following the post-World War II "baby boom" produced declining enrollments which moved through the elementary and secondary schools during the 1970s and early 1980s and which are now beginning at the college level. The number of high school graduates peaked in 1979 and is expected to decline until 1993. A national decline of 23.2

percent is projected for this age group from 1979 to 1993. Between 1985 and 1995 the number of 18- to 24-year-olds is expected to decrease by 18 percent. The number of college-age whites should decrease by 19 percent, compared to 14 percent for blacks. Larger declines are anticipated in the Northeast and smaller declines are expected in Georgia. In Georgia, two minor "baby boomlets" occurred in 1969-71 and in 1977-79, which influenced college enrollments in 1987-89 and potentially may influence them in 1997-99. From the fall of 1986 to the fall of 1989, University System of Georgia enrollment increased 16.7 percent.

- According to the National Center for Education Statistics (NCES), declining enrollments in elementary schools began reversing in the fall of 1983, when the first wave of children of the "baby boom" generation hit the first grade. Enrollments in grades K-8 are expected to increase 5.7 percent from 1989 to 1993. From 1989 to 2000, however, the increase is projected to total only 5.5 percent, because projected enrollments are expected to begin to decline again in 1999.

- High school graduating classes are expected to decline in size until 1998. Because of this, colleges and universities are receiving fewer applications--as much as 1 percent to 22 percent below the number received in 1989, according to The Chronicle of Higher Education (2/28/90). Northeastern institutions appear to be particularly hard-hit. Due to Georgia's 1977-79 "baby boomlet," however, the number of high school graduates in the state may increase in less than a decade. A number of University System institutions reported a decline in applications for the fall 1990 freshman class.

- In 1990, blacks comprised 12.5 percent of the total U.S. population. By 2000, that will have risen to 13.3 percent. Persons of Spanish origin (a group that contains persons included in the black classification) are expected to constitute 9.4 percent of the population in 2000, up from 7.9 percent in 1990, according to figures from the U.S. Census Bureau.

- According to a 1988 Southern Regional Education Board (SREB) report, the rate of black high school graduates enrolling in college has increased 3.1 percent from 1976 to 1986. During that same period in Georgia, it increased 11 percent. However, blacks were 18.3 percent of total enrollment in 1976, but were 17.6 percent in 1986. For the United States as a whole in 1986 28.8 percent of the black students were enrolled in predominantly black colleges; in Georgia 43.3 percent of the black students were enrolled in predominantly black colleges.

- An American Council on Education study reported in Grapevine (March 1990) indicates a decline in low-income black high school students entering college from 40 percent in 1976 to 30 percent in 1988. Comparably, the rates for black middle-income high school graduates declined from 53 percent to 36 percent over the same period. These decreases included a decline in the college-attendance rate for black men from 53 percent to 28 percent.

- From 1977 to 1985 the number of blacks receiving bachelor's degrees in the nation dropped 1.9 percent, while in Georgia there was an increase of 13 percent, according to 1988 SREB figures.

- The national college participation rate of 18- to 24-year-olds was 37.3 percent in 1988, up 0.9 percent from the year before. For the period from 1978 to 1988, participation was up significantly for Asians (111.5 percent) and Hispanics (63.1 percent), but black enrollment was up just 7.2 percent and white enrollment by 11.8 percent (Chronicle, 4/11/90).

- Enrollment at colleges and universities should rise about 2 percent for the fall of 1989, from 12.8 million in 1988 to 13.1 million, according to the U.S. Education Department. College officials attributed the gain to more students returning for their sophomore, junior and senior years. In anticipation of declines in the number of freshmen, many colleges have put increased emphasis on retention (Chronicle, 11/8/89).

- Universities awarded more doctorates in 1989 than in any previous year, a survey by the National Research Council found. Yet the record is attributed to a surge in foreign student enrollment, rather than an increase in degrees awarded to U.S. citizens. The results also showed that blacks earned 23.2 percent fewer doctorates than 10 years ago, but that the rates were up for other minority groups (Chronicle, 4/25/90).

- The number of American minorities enrolled in graduate programs has risen steadily in recent years, according to a survey conducted by the Council of Graduate Schools and the Graduate Record Examinations Board. The survey showed that from 1986 to 1988, the total number of U.S. citizens enrolled in graduate programs rose 2.9 percent; the rate for women rose slightly faster than for men. The number of blacks increased by 9 percent, Hispanics by 8.4 percent and Asian Americans by 13.1 percent (Chronicle, 5/2/90).

- According to an ASHE-ERIC higher education report, due to a drop in the birthrate of whites over the last two decades relative to minority birthrates, the percentage of white population in the United States dropped from 87.4 percent in 1970 to 83.2 percent in 1980. Blacks are now 12.5 percent of

the population. Hispanics are the fastest growing minority. Twenty-eight percent of whites are 18 years old or less, compared to 37 percent of blacks and 42 percent of Hispanics. Among the whole population, only 17 percent of Hispanics 18 years old or older have attended college, compared with 20 percent of blacks and 32 percent of whites. Seventy-five percent of whites between 18 and 19 years old have graduated from high school, compared to 57 percent of blacks and 54 percent of Hispanics.

- Part-time students now comprise more than four of every 10 students nationwide and in the SREB region, according to the 1988 SREB report. The part-time enrollment increases of nearly 26 percent nationwide and of nearly 52 percent in the SREB region between 1976 and 1986 are almost two times greater than the respective increases in total enrollment of 14 percent and 27 percent.

- Close to half of all students continuing with college after receiving their bachelor's degrees were enrolled part time in the fall of 1986, according to a report in Grapevine (July 1989). In the fall of 1987, 35 percent of college students in Georgia were enrolled part time.

- In the fall of 1986, 83 percent of first-time college students from Georgia enrolled in Georgia institutions, according to the Chronicle (9/6/89). This was the lowest percentage among the Southeastern states.

- Georgia's population grew from 5.46 million in 1980 to 6.66 million in 1990, a 21.4 percent increase. According to figures provided by the State Office of Planning and Budget, the population is projected to reach 7.78 million by 2000, an increase of another 17.3 percent. The U.S. Census bureau reports that black is the primary minority population in Georgia (estimated at 26.84 percent). A 0.05 percent increase in the black share of Georgia's population is estimated to have occurred over the past decade. According to Atlanta Regional Commission (ARC) figures for its planning area, black and other minorities accounted for 26.2 percent of the population of the eight-county Atlanta region in 1989, down from 27.5 percent in 1980.

- The Atlanta Metropolitan Statistical Area (MSA) is Georgia's most populous. In 1990, it encompasses 18 counties, 96 incorporated towns, and 2,772,663 inhabitants--41.8 percent of the state's population. By 2000, the Atlanta MSA is projected to have 3.37 million people and account for 43.2 percent of the state's population, according to the State Office of Planning and Budget. The population of the Atlanta MSA is growing faster than that of the state as a whole. It increased 29.7 percent from 1980 to 1990 and is expected to

increase another 21.4 percent from 1990 to 2000, compared to 21.4 percent and 17.3 percent for the state during the same time periods.

- The ARC projects that by 2000 the Atlanta region will be a metropolitan area of approximately 3.08 million people (29.8 percent more than in 1990). It is expected that more than half of that growth will result from in-migration. The population of central Atlanta is projected to grow by 12 percent.

- The total population of the traditional five-county area of Clayton, Cobb, DeKalb, Fulton and Gwinnett counties is expected to grow from 2,148,588 in 1990 to 2,512,795 in 2000, an increase of 17 percent. Fulton County is expected to grow by 10.8 percent. Growth rates for other counties are projected to be: Clayton, 16.6 percent; Cobb, 13.5 percent; DeKalb, 7.9 percent; and Gwinnett, 52.9 percent.

- Although Fulton and DeKalb counties are among the slowest growing counties in the Atlanta MSA, they are the two largest in population. The fastest growing counties in the Atlanta MSA from 1980 to 1990 were: Cherokee, 60.1 percent; Cobb, 41.8 percent; Fayette, 76.7 percent; Forsyth, 42 percent; Gwinnett, 78.5 percent; Henry, 44.9 percent; Paulding, 41.8 percent; and Rockdale, 41 percent.

- The densest population in the Atlanta MSA is in DeKalb County along Interstate 285.

- The predominantly northward thrust of physical development in the Atlanta metropolitan area is expected to continue, coalescing around nodes of activity served by mass transit, I-285, and major traffic arteries such as Buckhead-Lenox Square, Perimeter Center, and Cumberland-Galleria in Cobb County. Other areas of future development are near regional shopping malls in Gwinnett, north Cobb and south DeKalb counties. More modest growth should occur in south Fulton, Rockdale and Douglas counties and on Atlanta's South Side. Central Atlanta is expected to remain the region's largest employment concentration.

- The highest concentrations of people in the 20- to 44-year-old age group in unincorporated areas in metropolitan Atlanta are:
    1) in north DeKalb and Gwinnett counties in an area bounded by Peachtree Industrial Boulevard, Buford Highway, Interstate 85 north and Lawrenceville Highway;
    2) along the Interstate 75 north and U.S. Highway 41 corridor into Cobb County;

3) along Roswell Road and Georgia Highway 400 into north Fulton County; and
4) along I-285 in DeKalb County and spreading inward toward the Atlanta city limits.

Implications

- The University System is likely to face erratic enrollments over the next 15 years, with periods of growth followed by plateaus and declines. This may result in increased competition within higher education, especially between public and private institutions. Some institutions and programs face more serious stress than others.

- Georgia's potential demand for higher education is greater than the national trend due to continued Southeastern growth, an expanding economy and in-migration. Minority--especially Asian--and part-time enrollment should continue to grow.

- GSU is in the heart of a metropolitan area experiencing rapid growth in employment, population and physical development. This growth may help to offset the declining availability of traditional college-age students and may contribute to the maintenance of healthy enrollment levels.

- The continued dominance of the central business district in the Atlanta area for employment and finance will benefit GSU's ties to the business community.

- Higher education needs to focus on maximizing the percentage of minority students eligible for college to minimize the projected decline in the nonminority college-age youth cohort.

Significant Opportunities

- GSU can use its location in a dynamically growing urban area to gain a student recruitment advantage. Now that significant progress has been made on interstate highway and MARTA construction, it will be easier for students from outlying areas to commute to the downtown campus and vice versa.

- GSU can become more closely linked with metropolitan Atlanta's government and economic sectors. Continued provision of community services will help generate political and financial support.

Potential Problems

- Fluctuating enrollments could lead to unstable revenues for GSU and increase internal competition for funds. Competition among GSU and other nearby institutions could become severe.

- As metropolitan Atlanta grows northward, potential GSU students might choose to attend other, northerly institutions such as Kennesaw State College (KSC) or the University of Georgia (UGA).

- Greater reliance upon minority or culturally disadvantaged students for enrollment may lead to retention problems as some of these students experience difficulty in college-level coursework.

Cultural

Major Trends

- A survey conducted by the American Council on Education showed that the diverse needs of commuter students were among those items that topped a list of college and university presidents' concerns about campus life. Those answering the survey felt that there had been an erosion in the sense of community at many institutions. About 40 percent of the presidents felt that having students spend more time on campus would improve campus life, and about 45 percent said that their colleges were striving to provide services for commuter students (Chronicle, 5/2/90).

- The administrators of urban universities feel their schools need to be more responsive to the needs of the "new majority" students--persons with families and full-time jobs (Chronicle, 11/15/89). Methods suggested for accomplishing this include offering more ethnic-studies courses and establishing programs that share technical expertise with people from local companies.

- The U.S. population is getting older. Median age is projected to increase from 30.3 years in 1981 to 36.3 years in 2000. In 2010, 24 percent of the population will be more than 50 years old, compared with 20 percent in 1980.

- A study in Grapevine (July 1989) reported that 45 percent of all students continuing in college after receiving their bachelor's degrees were 30 years old or older. By the mid-1990s half of the nation's college professors will be older than 50 (Chronicle 4/18/90). According to the 1988-89 Georgia State University Annual Report, the average age of undergraduates at the university is 25; for graduates, it is 33; for faculty, 47.

- The Chronicle reports that half of all full-time college students aged 16 to 24 held jobs during the 1985-86 academic year--a proportion that has risen steadily over the last 25 years. In 1975, 43 percent of students worked; 25 percent

were employed in 1960. Contributing factors to this increase include: spiraling tuition costs, reduced student financial aid and increasing career consciousness among students. The 1988-89 GSU Annual Report states that at GSU, 53 percent of students work full time and 25 percent work part time.

- According to a survey by the Council for Advancement and Support of Education (CASE), four of every 10 American adults want to obtain further education. The largest percentage of them (26 percent) would choose to attend a vocational/technical school, due to lower costs.

- Completing a bachelor's degree in four continuous years is no longer the norm for American students. Among the reasons that students are taking longer to complete their degrees is that they cannot carry a full load because they have to work to pay for school, or because it allows them to earn higher grades, thereby increasing their chances of getting into graduate school (Chronicle, 2/21/90).

- A commission has been formed to build a consensus for reforming big-time college athletics. President Emeritus Hesburgh of the University of Notre Dame and President Emeritus Friday of the University of North Carolina System said they would investigate the problems facing college sports: too much money; an overemphasis on winning; and too little concern for educating athletes (Chronicle, 10/4/89).

- College students today are less academically prepared, more materialistic and more career-oriented than in previous decades. Students begin thinking about careers and graduate school as early as their freshman year. Administrators have noted that to prepare themselves for the job market, students are choosing "practical" majors such as business, engineering, marketing and finance (Chronicle, 1/31/90).

- Figures from the Georgia Senate Research Office indicate that more than a third of the state's 1988 high school seniors bound for Georgia's University System are underprepared for college-level coursework and must enroll in Developmental Studies. This figure has risen about half a percentage point every year since 1984.

- After enjoying a consistent rise and stabilization from 1981 to 1987, in recent years the high school Scholastic Aptitude Test (SAT) national average has been dropping. In 1989, the average composite score was 903, down from a 1985-87 high of 906. The 1989 average SAT verbal score dropped one point to 427, while the average mathematical score remained stable at 476.

- The average SAT score for Georgia high school students for 1989 was down one point to 847, significantly below the national average.

- Georgia's high school drop-out rate in 1988 was 39 percent, the third worst in the nation, according to an article in The Atlanta Journal and The Atlanta Constitution (5/3/90). This was up from 37.5 percent in 1987, and was 10.1 percent higher than the 1988 national average. Since 1982, the state's high school drop-out rate has risen 4 percent. Among the 50 states and the District of Columbia, Florida had the highest drop-out rate at 42 percent, followed by the District of Columbia at 41.8 percent.

- From 1989-90 to 1999-2000, the number of high school graduates in Georgia is projected to increase by 19 percent. Except for Florida, most other Southeastern states are projecting declines in the number of high school students.

- The gap in earnings has been widening between college and high school graduates. According to the U.S. Census Bureau, young college graduates made 68.5 percent more than high school graduates in 1988, compared to 39 percent in 1983.

- A much higher percentage of the diminishing youth cohort of the 1990s is expected to be from minority backgrounds, single-parent families and others who may have a difficult time getting prepared for college.

Implications

- The aging of the population and the growing trend toward lifelong learning may increase the proportion of non-traditional, part-time and nondegree college students.

- The growing age of the college faculty, although providing greater maturity and experience, may threaten the ability of colleges and universities continually to stress new research and to retain academic vitality.

- GSU has always served commuter, part-time and nontraditional students and therefore does not have to make structural and policy changes in order to accommodate the needs and demands of the nontraditional student.

- Those responsible for determining college curricula may face difficult choices in attempting to balance popular business and science career courses with the core liberal arts and sciences courses that provide the foundations of learning in Western civilization and with remedial courses needed to compensate for the lack of academic preparation among high school students.

- Continued poor preparation for college among Georgia's high school students may present problems for higher education retention and perhaps negatively impact GSU's enrollment and its image for academic quality.

- If the high school drop-out rate in Georgia can be improved, higher education demand potentially may increase and help to offset the declining pool of 18- to 24-year-olds.

- The high proportion of college students who work suggests the need for a flexible curriculum, more financial aid, and efficient job-placement and career-counseling services.

Significant Opportunities

- An urban, flexible, nonresidential institution such as GSU has strong appeal to the growing numbers of older, nontraditional, part-time students. GSU provides the kind of educational opportunities desired by today's career-minded college student. Continued attention to increasing student financial aid, to a flexible curriculum, and to providing student job placement and career counseling should help GSU to attract these students.

- Given GSU's location in the cultural center of the Southeast, the visual and performing arts could provide new opportunities for student recruitment and external funding.

- A decreased high-school drop-out rate in Georgia could mean more students for GSU. Georgia's institutions of higher education should help to support improvement in the state's public elementary and secondary schools.

Potential Problems

- Poor academic preparation and low college participation rates among Georgia's high school students could impede retention efforts and limit the market for recruitment.

- To the extent that traditional types of students are to be attracted, it may be necessary to make changes to accommodate these students with residence halls, student centers, intercollegiate athletics and campus activities.

- The increasing age and tenure-rates of GSU's teaching faculty could hamper the continuing revitalization of research and teaching fundamental to quality and scholarship. However, this may be tempered by the fact that most faculty retire by age 60.

Technological

Major Trends

- Computer and communication technology is increasing in speed, while dropping in cost. Personal computers and minicomputers are both supplementing and supplanting mainframe computers.
- The National Research Council warns that the demand for academic and nonacademic employees who have mathematics training will be 36 percent higher in 2000 than it was in 1986. Unless steps are taken quickly to revitalize mathematics education and to attract more people to the field, the nation could face a serious shortage of scientists, engineers, teachers and others with mathematical training in the 1990s (Chronicle, 4/18/90).

- The development of an information/service society requires additional higher education courses to provide training. Many of these courses are already being provided by the military, government agencies and businesses. One estimate indicates that there may be as many students participating in higher education outside colleges and universities as inside.

Implications

- Most fields of study are beginning to employ computer technology to gain increased access to information at lower cost. Fields that previously had limited use of computer technology are now experiencing demands by students and constituents for expertise in the latest computer-based technology.

- Many experts have expressed the hope that computer technology will increase student learning, faculty productivity and administrative efficiency.

- Educational service delivery will develop into new forms that will allow students to receive instruction and perform research more easily from their homes or from off-campus sites. Institutional outreach will no longer be limited to the immediately surrounding geographic area.

Significant Opportunities

- The proliferation of computer technologies will support the demand for college-level programs of study and the funding for research.

- GSU can forge stronger links to business and industry to attract additional support for research and create a stronger employment demand for its graduates.

Potential Problems

- Like other colleges and universities, GSU could find itself unable to compete with business, government and industry in providing up-to-date job training, particularly in computer and communications fields.

- Because new computer technology is replaced by quicker and less expensive equipment every one to three years, GSU must attempt to find funds to update and upgrade its instructional, research and administrative computer technology on a systematic and timely basis.

Economic

Major Trends

- Between 1970 and 1987, the proportion of middle-income families declined from 32.2 percent to 25.6 percent of all families. The proportion of families that were affluent rose from 34.5 percent to 38.3 percent. The proportion of poor families rose from 33.3 percent to 36.1 percent--the largest proportion of poor families since data on the subject were first collected in 1947 (Grapevine, March 1990).

- Based on 1986 income data, more than 70 percent of all children would require financial aid to be able to attend a public two-year college and more than 80 percent would require it to attend a public four-year college or university. More than 90 percent would require financial aid in order to attend an average-cost, private, four-year college (Grapevine, March 1990).

- While all lower- and middle-income families are affected by the redistribution of American wealth over the past two decades, minorities are being affected disproportionately. Blacks are graduating in greater numbers from high school, scoring higher on college entrance exams and showing greater interest in attending college--yet fewer blacks are attending college.

- The declining proportion of youth in large segments of America in the 1990s may mean that many young people will be able to move directly from high school to good jobs--either by bypassing or deferring college, or by getting college-level training from employers. It is estimated that 46 million adults are being educated by other service providers compared to 12 million in colleges.

- In the fall of 1986, 57 percent of all students continuing with school after earning their bachelor's degrees received

financial aid (Grapevine, July 1989). More than one-third of them received institutional aid and 27.3 percent were awarded federal aid.

- Forty-three percent of 1983-84 graduates of all four-year institutions had average debts of $5,500--twice the average of 1977. For public universities, 29 percent owed more than $7,000 (Grapevine, March 1990).

- The Chronicle reports that the relationships between business and academic institutions are more cordial than they have been for decades. Three-quarters of the nation's colleges have some ties with business involving such things as job training, continuing education, cooperative employees, etc.

- College and university endowments for 1989 were up an average of 14.1 percent over the previous year, according to a report by the National Association of College and University Business Officers (Chronicle, 2/21/90). This represents the largest increase since 1985-86. UGA recently received a $6 million endowment for their college of business administration, the largest cash gift ever made to the university.

- The Georgia institutions that raised the most external funding for 1988 are: Georgia Institute of Technology (GIT), $63 million; Emory University, $48 million; and UGA, $22 million (Chronicle, 9/6/89).

- Since 1974, world wealth has been undergoing redistribution. The United States faces increasing foreign competition in the production of goods and services. U.S. trade has been increasing with the Orient and Latin America; Los Angeles, San Francisco and Miami have emerged as trade centers with these countries.

- A recent report called for the federal government and private agencies to increase support for international-exchange programs. The move would help the United States to adjust to the increasingly international business climate by increasing the number of American college students who have had exposure to other cultures (Chronicle, 4/25/90).

- The structure of the U.S. economy has been changing from an industrial to a service/information society. Jobs to support this structure require skilled, flexible workers who possess both quantitative and communications skills. Georgia Business and Economic Conditions (March-April 1990) projects that the services sector will generate 20,000 new jobs in the state in both 1990 and 1991.

- White-collar, office-oriented jobs will dominate Atlanta's economy. Service occupations will increase 233 percent from

1980 to 2010. Manufacturing will decline from 14.7 percent to 9.8 percent. The government sector will fall from 16 percent in the 1980s to a projected 15.3 percent in 2010 (Georgia Business and Economic Conditions, March-April 1990).

- Georgia's economic growth is expected to slow during 1990 and 1991. Nonfarm employment is projected to increase by 1.7 percent and 2 percent, respectively, and real personal income is expected to grow by 2.1 percent and 2.2 percent. If the nation were to slip into a recession, however, it is doubtful that the Georgia economy would be able to resist following (Georgia Business and Economic Conditions, March-April 1990).

- The government sector, primarily local and state governments, is expected to be a prime source of new jobs in 1990 and 1991. After a three-year decline, the construction industry is expected to stabilize in the next two years. Retail employment, however, is expected to increase by only 1.6 percent in 1990. The demand for management consultants and health services professionals is expected to rise sharply during the 1990s (Georgia Business and Economic Conditions, March-April 1990).

- The ARC projects that the number of jobs in six of the seven counties in the Atlanta region will double from 1980 to 2010. Fulton County will have the region's largest increase--420,000 jobs--but because of the size of its 1980 job base will have a gain of only 94 percent. From 1980 to 1990, employment in the region is projected to increase by 64 percent. A 32 percent increase is expected for the 1990s and a 23 percent increase from 2000 to 2010.

- In 1989, 49.3 percent of all Georgians not employed in agriculture worked in the Atlanta MSA, according to figures from the State Department of Labor. From 1979 to 1989, employment in the Atlanta MSA grew 32.9 percent, compared to 27.8 percent in the state as a whole. The Atlanta MSA currently contributes more than half of the state's personal income tax.

- The total impact of GSU on the Atlanta area economy in 1989 was estimated at $241 million. The university provided 2,249 full-time jobs and 1,747 part-time jobs. University-related spending generated an additional 2,973 jobs in the Atlanta area.

Implications

- Demand for college-trained workers will increase. Technology-driven industries will require a high-quality University System with major research capabilities. More than ever,

economic development supports the availability of and access to quality educational institutions.

- Colleges that offer a full range of financial aid packages will be able to attract a more heterogenous student population, including merit scholars and students from economic and culturally deprived backgrounds.

- Higher education will need to stress foreign languages and international relations in their curricula to prepare students with necessary job skills, including the basic general skills of writing, communication, reasoning and mathematics.

Significant Opportunities

- Society's need for college-trained workers with sophisticated quantitative and communication skills will benefit those colleges and universities with modern research facilities and curricula that emphasize computer literacy, a solid core of liberal arts courses, practical job experience and an international orientation.

- GSU can emphasize the importance of its effect on the local economy to enhance its public image and to help recruit political and financial support.

- GSU's flexible course schedule already serves as a magnet for students who move directly from high school to the workplace. The only limitation on this resource is having sufficient classrooms available at the hours that these working students are available to attend classes.

- GSU has traditionally provided financial aid to a much smaller proportion of its student body than most other institutions of its size and mission. Thus there is considerable potential to use financial aid to attract and retain a heterogenous student body.

Potential Problems

- If economic predictions of a labor shortage in the 1990s prove correct, it is not certain whether this will lead to a decline in enrollment or to its stabilization.

- The potential danger in the over-emphasis of teaching marketable, entry-level skills is that students may be short-changed in developing general thinking skills and ethics. Decisions on academic program offerings can become tied solely to employment, political and student demand, rather than to the general need to maximize the quality of human life.

- GSU currently is experiencing increasing costs, deteriorating facilities and demand for new technologies, at the same time as its sources of funding are diminishing. Either new sources of funding will have to be found or internal reallocation of resources may have to be considered in order to avail the university of its numerous opportunities.

Political

Major Trends

- Total college costs are expected to rise between 5 percent and 11 percent in the 1990-91 academic year. This is the 10th year in a row that the average tuition rate has risen faster than the rate of inflation. In addition, in its 1991-92 budget proposal, the Bush administration has proposed that student aid be cut (Chronicle, 2/14/90).

- Threats to reduce the federal budget for higher education appear to be mitigated by Congressional interest in education as an important tool for preparing the citizenry to deal successfully with future economic, social and technological changes. There is also the fear that poor educational quality is putting American companies at a disadvantage in the world economy. According to an article in the Chronicle (5/2/90), Congress is considering a budget resolution that will increase 1990 education spending by more than 16 percent.

- The 1990 congressional elections could prove to be a turning point for the Congressional committees which oversee higher education. Some senators and representatives may not seek re-election, and still others face tough competition in their re-election campaigns (Chronicle, 11/8/89).

- The Higher Education Act of 1965 is up for renewal in 1991. The act authorizes student-aid programs, aid for developing institutions and other programs. High among the list of concerns is whether students at proprietary schools should continue to receive aid from the same programs as regular college students (Chronicle, 11/15/89 and 5/2/90).

- In Georgia, state appropriations for the University System grew 151 percent during the 10-year period from 1977-78 to 1987-88. When compared with a group of 34 other consolidated systems of higher education, the University System was above the 129 percent average for 10-year gain, and equal to the 14 percent average for two-year gain. Seven systems showed a higher 10-year gain than the University System, and 11 showed a higher two-year gain (Grapevine, March-April 1988).

- Georgia has climbed three places in the national rankings of per capita state appropriations for higher education between

1977-78 and 1987-88. In 1977-78, Georgia ranked 40th, with $59.66 per capita; by 1987-88, the amount had increased to $122.05 and the state ranked 37th (Grapevine, April 1989).

- For the 10-year period ending in 1989-90, state appropriations for higher education in Georgia--adjusted for inflation--increased 36 percent, with a national ranking of 13. For the most recent two-year period, the inflation-adjusted increase was 7 percent and the national rank 17. The two-year change in appropriation for individual institutions showed Georgia Southern College (GSC) increasing by 39 percent, KSC by 30 percent, GIT by 22 percent, UGA by 15 percent, GSU by 12 percent and the Medical College of Georgia (MCG) by 5 percent (Chronicle, 10/4/89).

- State and local governments are allocating a seriously declining share of their tax revenues to public higher education--8.1 percent in 1987-88, compared to the recent peak of 9.2 percent in 1980-81 (Grapevine, July-August 1988).

- Grapevine (March 1990) quoted a recent story in The Chicago Tribune to describe the increased cost of attending public colleges and universities: "Since 1977, tuition in the State's public universities has risen 287 percent--more than 2.5 times as fast as the CPI [Consumer Price Index]." The article in the education journal pointed out that although most public universities have acted responsibly to protect the necessary scope and quality of their programs by increasing tuition, the problems hindering the affordability of public higher education are more complex than simply spiraling tuition rates.

- There appears to be a trend for colleges, politicians and lobbying groups to strive to compromise on tuition-increase issues. This has been spurred by a realization on the part of college officials, students and others that tuition has frequently been raised in order to cover declining government appropriations from states in fiscal crises. In some cases, their combined bargaining power and moderated demands have succeeded in holding down tuition increases (Chronicle, 2/14/90).

- At a National Conference of State Legislators, many state political leaders questioned the value of providing remedial education at public institutions of higher education, suggesting instead a focus on improving elementary and secondary education.

- During the 1985 session of the Georgia General Assembly, the Quality Basic Education Act (QBE) was passed; most of the bill's provisions went into effect on Jan. 1, 1986. The purpose of the act was radically to upgrade the quality of Georgia's public school systems through such methods as

mandatory master's degrees for classroom teachers, and teacher-competency testing and reviews. It was based on the recommendations of the Education Review Commission. Originally no new tax money was to be diverted to the education system in order to enact the law, but legal and administrative roadblocks made the act more difficult to implement than had been anticipated. Therefore, some provisions, such as the mandatory master's degree for teachers, have been dropped.

- Federal and state governments exercise an ever-tightening grip over universities. Approximately 70 percent of all public colleges and universities cannot start a new academic program without elaborate application and approval procedures from their state coordinating boards (these can take up to four years to complete).

- The number of academic-support staff at the nation's colleges and universities rose 61.1 percent from 1975 to 1985. This is attributable in part to an increase in the documentation needed to prove compliance with new government regulations (Chronicle, 3/28/90).

- A College Entrance Examination Board study found that many states are raising public education admissions standards, by imposing or strengthening a prescribed pattern of high school coursework for entering freshmen.

- There is a prevailing recognition in state governments of the direct relationship between higher education and economic development. States are providing financial support to higher education in such areas as training, technological development, and collaboration with business and industry (Grapevine, January-February 1989).

- A report sponsored by the National Endowment for the Humanities entitled, "50 Hours: A Core Curriculum for College Students," touted the need for a more structured core taught by colleges' distinguished professors (Chronicle, 10/11/89). This strict curriculum includes two years of foreign language study and one year each in natural science, social science and mathematics.

- According to the Chronicle, officials with the American Association of Colleges for Teacher Education predict that, because of a report from the Carnegie Task Force on Teaching as a Profession calling for the elimination of undergraduate education programs in order to improve the quality of teacher education, no more than 60 percent of institutions with undergraduate teaching programs would still have them 10 years later.

- The Chronicle reports that more states are requiring professionals to upgrade their skills with continuing education. This is particularly true of accountants, lawyers, pharmacists and realtors.

- GSU's library is visited more than 40,000 times a week. A survey of library users estimated that 34,890 of the visitors were associated with GSU; 1,297 were associated with other University System institutions; 2,442 were associated with nonsystem educational institutions; 1,526 were from the business community; and 462 were governmental employees. An estimated 11 percent of library users are not affiliated with the University System.

Implications

- In spite of sharp federal budget cuts projected due to high deficits, the recognition by national leaders of the importance of education in helping U.S. businesses compete in an increasingly knowledge-oriented, international economy appears to be responsible for somewhat stable federal support for higher education.

- State legislatures are likely to continue to pressure college and university systems to expand both their quantitative and their qualitative assessment efforts in the hope that efficiency and productivity might be increased.

- As regulation of higher education by state governments increases, individual colleges and universities need to increase their efforts in political lobbying, in building a strong public image and in anticipating policy changes.

- Strong support for higher education in Georgia should help the University System maintain its stability throughout the period of a declining traditionally aged college population, although some cutbacks, closures or consolidations may be necessary.

- Public higher education will be challenged to remain productive in the face of mounting paperwork requirements generated by increasing federal and state regulation.

Significant Opportunities

- GSU can take advantage of the positive climate for higher education in Georgia to gain greater support for facilities improvement, research, and new buildings and programs by intensifying state legislative ties and by building a stronger public image as an urban research university able to assist the community in technology and economic development.

- GSU could develop strategies to persuade state funding sources to provide additional funding that recognizes the expensive demands caused by a large number of part-time and special needs students. For instance, the intensive morning and evening use of instructional facilities significantly increases maintenance and wear-and-tear, and shortens the amount of time before major renovations are required. There needs to be a recognition that the cost of serving the needs of an individual student does not automatically decrease if the student attends part-time rather than full-time. The GSU library serves large numbers of non-University System students and local business and government employees, without receiving the additional funding to do so.

- Because of the business community's upsurge of interest in higher education, GSU can aggressively court the financial and political support of business by using the university's community-outreach programs such as: continuing education; job placement, cooperative and internship services; the alumni network; and the school's variety of research institutes in such areas as international business, economic forecasting, and public and urban affairs.

Potential Problems

- With demands upon the University System to add additional universities in southern Georgia and to give two-year institutions four-year status, the existing universities are likely to experience difficulty in maintaining their proportion of the state appropriation.

- Failure to maintain a positive relationship between GSU and state legislative and regulatory agencies could increase the prospects of program cutbacks and funding decreases.

Internal Environment

The internal environment concerns the administrative and academic climate of GSU in relation to its perceived mission. Faculty and administrators recognized that although the university enjoys a positive image in its immediate geographic vicinity, its public image does not reflect its size, quality and influence. GSU's mission is described as promoting the advancement of knowledge through excellence in teaching, research and public service. The university perceives its role as meeting the needs arising from a complex, urban-industrial society, offering a broad range of credit and noncredit educational opportunities in a climate of academic freedom and dedication to excellence. Through

internal self-studies, GSU has the opportunity to identify both its strengths and weaknesses and to determine the extent to which its mission is relevant both to the changing environment and to its academic traditions. The trends and implications of additional GSU reports that assess the internal environment follow.

Major Trends

Institutional Functioning Inventory (1982)

- Faculty who took part in a 1982 survey generally agreed that GSU is effective at meeting the needs of the local community and that advancement of knowledge is the institution's chief concern.

Institutional Needs Assessment (1982)

- Unique institutional characteristics of GSU include its academic excellence, urban location, students, faculty, library, low tuition and economic impact.

- The primary community/employment service area of GSU is the Atlanta MSA, and the secondary service area is the state as a whole. Many programs serve a regional or national area, such as business administration, higher education and rehabilitation counseling.

- GSU's academic, continuing education and research programs provide services to its constituents in areas identified by the Board of Regents such as business, industry, technology, health professions, teacher education, and public and social services.

Institutional Report for the Productivity/Management Review (1984)

- In September 1980, the Board of Regents directed that there be a periodic review (in a five-year cycle) of institutions within the system. The review process, initiated in 1981, resulted in this institutional report containing information compiled about GSU concerning administration, budget, faculty, academic programs, students, continuing education and research. (The board's staff review of system program enrollments, average class size and degrees conferred for a three-year period indicates that certain programs are considered low-producing. Procedures for improving the status of programs throughout the system are to be developed. Source: System Summary, September 1984, p. 7.)

- Matters of institutional concern outlined include:

  1) the need for greater recognition of GSU's abilities to fulfill its statewide purpose, offering courses and opportunities for citizens of the state beyond the confines of the Atlanta metropolitan area;
  2) the university library is ranked near the bottom compared to other universities in the Southeast;
  3) lack of general- and special-purpose classroom space at periods of peak demand;
  4) lack of laboratory space and safe, modern laboratory facilities;
  5) lack of adequate parking facilities, continuing education and student services space, and recreation facilities;
  6) low pay for university staff and for research, training and graduate students affecting morale; and
  7) the overloaded, antiquated computer-services equipment and facilities.

- Institutional strengths identified in the report include:

  1) recognition of many of the university's academic programs by national accreditation organizations;
  2) good faculty (three-fourths of the faculty hold doctorates and 68 percent have tenure);
  3) an older, diverse student body (with mature attitudes and career orientations);
  4) flexibility of the class schedule and the availability of classes at other locations;
  5) increasing support for student financial aid;
  6) new programs in computer science, astrophysics and business economics;
  7) strong continuing education/public service programs; and
  8) a competent and professional staff.

<u>1987-88 Institutional Self-Study Report</u>

- Objectives for the 1990s identified in the report include the following:

  1) Improvement of the quality of education in all programs.
  2) Implementation of programs to meet the needs of students and community in a rapidly changing society.
  3) Continuation of curriculum evaluation with appropriate faculty involvement to facilitate changes needed to meet programmatic needs.

4) Development and implementation of strategies to improve instruction and to promote faculty development.
5) Responsiveness to the public service and continuing education needs of the city and the state.
6) Increased emphasis on student development in terms of leadership skills, co-curricular activities, and interaction with faculty and staff.
7) Development of a sense of loyalty and support on the part of graduates of the University.
8) Increased interaction between the University and the local, state, and federal government agencies; the business community; and the communications network.
9) Focus on managerial responsibility for fiscal and physical resources in order to maximize the effective use of these resources.
10) Recognition that the changing nature of society, student population, community needs, and advances in research and technology will require a posture of adaptation and interaction with future forces.

- GSU's mission is to promote the advancement of knowledge through excellence in teaching, research and public service. The institution serves individual students, other institutions of higher learning, social and government agencies, and society at large in a creative climate of academic freedom and responsibility.

<u>The Academic Plan: Goals, Targets, First Steps (1987-88)</u>

- The academic purpose of GSU is to serve the academic needs of its various publics through the development and maintenance of high-quality programs. These programs will provide lifelong educational experiences through traditional and nontraditional means and will promote the acquisition and dissemination of knowledge in the context of national and international scholarly norms.

- Among the targets the plan isolates are:
  1) Increase awareness of the university among its various publics to increase financial and political support.
  2) Make efforts to transform the university into a major research institution, and work to enhance consultative services and continuing education programs.
  3) Determine criteria to measure effectiveness and to evaluate the quality of faculty work.
  4) Create and encourage student participation in on-campus activities such as cultural events, recreational activities, organizations, etc. . . .

5) Strive to offer faculty opportunities equal to or better than those available at comparable schools to help recruit and retain quality faculty.
6) Make efforts to improve course offerings and create an honor society to encourage academic excellence.
7) Establish academic centers and institutes, as well as interdisciplinary programs and international programs.
8) Keep the library facilities and computer technology of the university sufficiently current to allow for achievement of GSU's academic mission.
9) Study the academic, administrative and organizational structures of the university in order to improve governance and coordination.

Board of Regents Policy on Planning and Assessment

- The Board of Regents policy Section 209, quoted in the introductory section of this report, requires each institution to develop a strategic plan. The staff of the board has developed the following guidelines to ensure compliance with board policy. All plans must have:

  1) a loose-leaf format;
  2) a description of the institution and its mission and purpose;
  3) institutional planning assumptions;
  4) a description of the institutional planning and assessment structure and process; and
  5) a summary of the institution's priorities, goals and objectives.

- The following is a tentative working list of planning assumptions for GSU's strategic plan:

  1) The current Board of Regents' formula for institutional allocation of funds will continue for five or more years.
  2) The legislative allocation to the Board of Regents will not increase significantly for five or more years whether or not by formula.
  3) GSU will continue to maintain its current location in downtown Atlanta with some expectation of a modest increase in land and facilities.
  4) GSU will continue to provide instruction and other educational services at other specific outreach sites in metropolitan Atlanta.
  5) GSU will continue to provide instruction for part-time and nontraditional students on a day and evening schedule.
  6) The university will continue its efforts to attract highly qualified, traditional entering freshmen to

establish a core of full-time students with honors potential.

7) The university will increase the emphasis given to research activity by significantly increasing nonstate and state funding for research.
8) The terms quality, excellence and class will continue to be used as identifiers for GSU's programs.
9) GSU will continue to identify itself as a comprehensive university while at the same time maintaining its mission to be a great, urban, metropolitan university.
10) The available number of college students for recruitment into Georgia colleges will increase only slightly during this decade.

Implications

- GSU may find itself operating in a climate of financial stress with funds tied to an enrollment-driven formula geared to growth.

- GSU's academic and continuing education programs enjoy a reputation greater than that of the university as a whole. A stronger public image has positive implications for student and funding recruitment.

- GSU's reputation as a preeminent urban university, although of itself positive, fails to stress the university's capability for providing research and instruction on a statewide, regional or national level.

- Institutional marketing, planning and developmental functions need to be effectively coordinated for optimum institutional advancement.

Significant Opportunities

- Because GSU has many outstanding academic and public-service features, the university has a great opportunity for institutional advancement by improving and marketing its public image. A potential expanding market exists for the university for statewide/regional/national educational programs and research. Emphasis on alternative educational delivery systems can help to increase market penetration.

- Opportunities for alternative financing and for more research support can be pursued.

- GSU can make use of other facilities for educational service delivery to new markets. Careful planning can help ensure against "over-expansion" and the implementation of programs that are not cost-effective.

Potential Problems

- The Board of Regents' surveillance of low-producing programs can lower faculty and staff morale.
- The ability of competing institutions to recruit students, funding and research away from GSU may be increased should GSU not improve its public image and effectively coordinate universitywide planning and marketing.
- Continued reliance on inadequate space and facilities could seriously impair university efforts for student, faculty and research recruitment.

Market Environment

The market environment encompasses the university's constituents that are consumers of its educational services (freshman, transfer, graduate and continuing-education students, as well as alumni). Most of GSU's students traditionally are located in the northeast Atlanta metropolitan area; more recently, they have come from around and beyond I-285 in DeKalb and Gwinnett counties between I-85 and Interstate 20. The potential to maintain or increase the university's moderate enrollment growth exists through improved retention, the use of satellite campus locations and other forms of alternative educational service delivery, and recruiting in areas where GSU is traditionally weak (Cobb County beyond I-285, south metropolitan Atlanta beyond I-285 and high schools that send few students to GSU). Supporting items of information regarding the trends and implications of the market environment follow.

Major Trends

Degrees Conferred

- The number of degrees conferred at GSU has remained stable during fiscal years 1980 to 1989, fluctuating between a 1983 low of 3,473 and the 1989 high of 3,977. Significant increases in degrees conferred at GSU have occurred in the bachelor's and master's programs in business administration, the bachelor's program in public and urban affairs, and in the master's program in health sciences. Declines in degrees conferred at GSU have occurred in the bachelor's program in health sciences and in the master's program in education. The number of bachelor's degrees conferred in the College of Arts and Sciences remained stable, and the number of master's degrees conferred is increasing after a mid-1980s slump.

- Women have consistently received more than 50 percent of the total degrees conferred since 1974. Minorities have comprised more than 15 percent of those receiving degrees from GSU since 1983.

Transfers

- A survey of undergraduate transfer no-shows indicates a preference for attending schools closer to students' homes, curricula that GSU does not offer, a more personal atmosphere or a smaller school.

- An analysis of fall 1989 University System transfers revealed that more than half the total number of transfers moved from one system institution to another. Of the 17,542 transfers received by system institutions, 8,418 came from schools outside the system, both in-state and out-of-state. While UGA has the lead in in-state, nonsystem transfers, GSU dominates the out-of-state transfer market, and last year received the largest number of transfers--2,970--with UGA next in line at 2,412 transfers.

- GSU receives more system transfer students than any other system school. From fiscal year 1984 to fiscal year 1988, the number of transfers to GSU has risen consistently, with the largest jumps occurring in 1987 and 1988. This may be attributed in part to the addition of DeKalb College (DKC) to the University System in 1987. Since then, DKC has provided more than 500 transfers to GSU annually, more than twice the number provided by UGA, the next largest source of transfers. During fiscal year 1989, the number of system transfers to GSU dropped to 1,541 from 1,672 the year before.

Enrollment at GSU

- GSU's growth has slowed after a surge during the late 1960s and early 1970s. Fall quarter enrollment from 1979 to 1989 has risen by an average of 270 students per year. Enrollment for fall quarter 1989, however, jumped by nearly 800 students, from 22,245 the previous fall to 23,039. During the last decade, enrollments in both the College of Arts and Sciences and the College of Business Administration have grown consistently, as has enrollment at the College of Law since its inception in 1981. Enrollments in both the College of Public and Urban Affairs and the College of Health Sciences appear to be declining after increases in the mid-1980s. The College of Education is continuing a fairly steady decline that started in 1975. Enrollment in that college, however, jumped from 3,406 in fall quarter 1988 to 3,534 in fall quarter 1989, the largest increase since 1975. Total enrollment at GSU peaks in the fall and bottoms out in the summer.

- Black enrollment has remained stable during the last decade. It reached a high of 17.1 percent of the total student population in fall quarter 1985, and a low of 15.8 percent in fall quarter 1981. The percentage of black enrollment in fall quarter 1989 was 16.9 percent.

- Overall graduate enrollment declined by 5.8 percent from fall quarter 1980 to fall quarter 1988.

- Generally, GSU is expected to continue the moderate growth trend established in the 1970s due to the anticipated continuation of increased participation by older, part-time students who typify those students who attend GSU.

- In 1990, an Enrollment Management Task Force was established. Some issues to be addressed include: the size and composition of the student body; recruitment strategies and priorities; academic advisement and orientation; planning for scheduling and registration activities to meet the needs of admitted students; and student retention. More specific definitions of issues and strategies will be the first goal of the task force steering committee.

Retention

- Students who attend public universities are somewhat less likely to graduate than those who attend private institutions. Forty-three percent of public-college students had completed a degree within six years of enrolling, compared to 54 percent of those attending private colleges. A study found that most of the students who drop out do so after the first year (Chronicle, 2/21/90).

- At GSU, the retention rate of those students who entered fall quarter 1984 as full-time, first-time freshmen shows that after five years (fall 1989) 44.4 percent of regularly admitted black freshmen were retained, as were 56.1 percent of all other freshmen. For Developmental Studies students, the rate five years later was 20.5 percent for blacks and 41.1 percent for all others. Graduation rates for the same study group show that five years later 38.8 percent of the black regularly admitted freshmen and 46.6 percent of all other freshmen had graduated. Among the Developmental Studies students, the rates were 15.2 percent for blacks and 29.4 percent for all others.

- Overall, GSU's retention rates appear to be typical of state universities. Retained students exhibit a strong tendency to have higher grade-point averages (GPAs) and credit hours earned. Nonretained students tend to exhibit dropping GPAs. Transfer students are less likely to be retained than are

native students. At the undergraduate level, younger students are more likely to be retained; at the graduate and law levels, older students are more likely to be retained.

- Nationally, students who receive federal grants to help pay for their education have higher retention rates than those who received no money. Among both black and white students who received federal aid, 93 percent attended college after their first year. Among those who did not receive aid, 66 percent of black students and 77 percent of whites remained in school (Chronicle, 2/21/90).

- Those students who receive financial aid tend to take more classes and attend class at higher rates than nonrecipients. Persistence in school over time is strongly related to being enrolled in a vocationally oriented field.

- According to 1985 institutional research reports, students without a major field of study consistently have lower retention rates from fall quarter to fall quarter. Students with majors in business and management consistently have higher retention rates. Students with high GPAs are more likely to have a declared major.

- Generally, there is evidence that nontraditional students (older, employed or attending part-time) such as those at GSU experience a higher attrition rate than traditional students. A follow-up survey of nonreturning students suggests that a weak external support system (lack of financial resources and work conflicts), rather than social integration variables, was a major reason for students dropping out. A high percentage of the surveyed students intended to return to GSU, suggesting that many nonreturning students could be considered "stop-outs" rather than "drop-outs."

Satellite Campus and Alternative Education Delivery

- In the winter of 1989, the North Metro Center was established by GSU in north Fulton County near Perimeter Mall. A long-term lease was entered into for 10,605 square feet, resulting in seven classrooms. By winter of 1990, the center had been expanded to 21,210 square feet and 17 classrooms. This center is at capacity in the evenings and does extensive continuing education activities along with academic classes during the day. The current University System of Georgia Gwinnett Center, established in fall of 1989, has approximately 25,000 square feet and 25 classrooms. It is a consortium in which GSU shares these facilities with UGA and DKC.

- The Chronicle (9/27/89) reports increasing interest in "distance learning," where college-level courses are taught by correspondence, by television, by computer links or

tutorial software, by audiotapes, or by some combination of these. Few faculty like to teach these courses because the student-professor interaction is missing, and many administrators oppose distance learning because they feel that campus life is an important part of higher education. Yet, many students who have taken distance-learning courses say they are pleased with both their convenience and their intellectual content.

- Consideration is currently being given to establishing a South Metro Center somewhere near the airport in south Fulton County.

- A survey of off-campus students attending GSU in fall 1985 revealed that white females are represented disproportionately higher at DKC and other off-campus locations. Black students are less likely to attend off-campus centers except at the graduate level. Off-campus students tend to register for fewer credit hours and to have accumulated fewer hours than central campus students.

Alumni

- More than 70 percent of the respondents of a fiscal year 1989 survey of GSU graduates were satisfied with their education at GSU. While more than 18 percent expressed no opinion, 20.7 percent strongly agreed with the statement that their educational experience at GSU was outstanding, and 51.1 percent agreed.

Student Location/Demographics

- A fall 1989 housing survey indicated that 55 percent of Developmental Studies students and 50 percent of freshman students were interested in housing on, adjacent to or near the GSU campus. The percentages of students wanting housing dropped as the class level went up. More men than women, and more single students than married, divorced or widowed were interested. Forty-four percent of full-time students favored campus housing.

- Freshmen entering during the fall quarter tend to come from high schools in the northeast metropolitan Atlanta area, both inside and outside the perimeter. Black freshmen tend to come from schools within the perimeter. There has been recent growth in freshman enrollment from high schools south of the perimeter.

- GSU students in general are concentrated in Fulton and DeKalb counties, particularly east of the downtown connector and, north of I-20 east and along I-85 north.

Implications

- Transfer students from both inside and outside the University System are the mainstay of GSU's enrollment. DKC remains the significant source of transfers for GSU.

- Improving black student retention (particularly for males) could contribute to maintaining healthy enrollments. Finding new avenues of student financial aid could also benefit student retention.

- Student demand for coursework offered at locations other than the downtown campus indicates the benefits and profit potential of satellite campuses.

- There exists some potential for market expansion of freshman students in areas beyond the perimeter, particularly northwest of I-285 (Cobb County), and south of I-285.

- Because students who have dropped out seem to do so because of a weak external support system rather than poor social integration, improved retention may be achieved by focusing on student financial aid, academic tutoring, student employment and career counseling.

- The black student market in the Atlanta metropolitan area is dominated by GSU. There appears to be little opportunity to expand this market except to improve the retention rate of black students already enrolled.

  Some high schools consistently send more students to GSU, which reveals the potential for increased student recruitment at high schools that send fewer students.

Significant Opportunities

- As the demand for education degrees begins to increase again, GSU can capture a large share of the local market and continue providing flexible summer/evening coursework for graduate students. Continued expansion of the health sciences, business and law programs can take advantage of the high demand for degrees in these fields.

- Additional opportunities for enrollment expansion (or stabilization) exist through better student retention, increased student financial aid, the use of satellite campuses, increased attention to geographic areas where GSU is traditionally weak (Cobb County beyond I-285, south metropolitan Atlanta beyond I-285, high schools that send low numbers of students to GSU), and more assertive recruitment of freshman, part-time and transfer students, and of former students who did not complete a degree.

- By increasing student job satisfaction levels after graduation with more attention to career counseling and career-oriented coursework and internships in the colleges of Arts and Sciences and Public and Urban Affairs, GSU can build a stronger alumni base of political and financial support.

Potential Problems

- Without assertive retention, recruitment, alumni-support and public-image programs as a part of a coordinated market plan, GSU could face declining enrollments involving possible program cutbacks during the 1990s.

- Expansion of GSU (satellite campuses, etc.) that does not consider specific student demand for coursework could result in burdensome operating costs relative to low service demand.

- Emphasis on recruitment of off-campus, nondegree or part-time students tends to underrepresent GSU's productivity as represented by full-time equivalent (FTE) enrollment and degrees conferred.

- Because students who take more credit hours are more likely to be retained, GSU's flexible policy of charging fees on a per course basis may lead to a misleading representation of the university's retention rate.

Public Environment

The public environment concerns the university's public image and the various local, state and regional governmental and legislative activities that influence higher education and the university. In December 1984, SACS promulgated its new Criteria for Accreditation. The Criteria strongly emphasizes the need for institutions to evaluate institutional effectiveness in addition to taking inventory of inputs and processes. Additionally, regulatory monitoring by the Board of Regents of University System institutions is becoming increasingly intense concerning institutional productivity, program efficiency and educational outcomes. Although this may result in increasing tension between GSU and other system institutions and between GSU and state and regional government agencies, GSU can use the requirements as an impetus actively to redefine purposes, to assess its educational results, and to make plans to improve programs based on these assessments. Supporting items of information regarding the trends and implications of GSU's public environment follow.

Major Trends

Public Image

- A spring 1985 survey of high school counselors revealed that those in the Atlanta area recommended GSU more frequently than other system institutions. Statewide, UGA was most frequently recommended, followed by Georgia Southern College (GSC), GIT and West Georgia College (WGC).

- High school counselors assessed GSU's business and management programs as most popular with undergraduate students at GSU; health professions, education, psychology, criminal justice, and the art and music programs also received high ratings.

- High school counselors gave highly favorable ratings to academic excellence, library and faculty reputation at GSU. Facilities at GSU were rated above average, and parking and athletic programs were rated below average.

Financial and Political Climate

- The Board of Regents' new Policy on Planning and Assessment (Section 209) and SACS' Criteria for Accreditation place a strong emphasis on institutional effectiveness, contrasting with the longstanding focus on inputs and process.

- A comparative analysis of facility usage found that GSU ranked 31st of the 34 system institutions in academic square feet per quarter credit hour. Focusing specifically on classroom usage, it was determined that GSU ranked 34th of the system institutions in the number of classrooms per quarter credit hour.

- Georgia has two leading research universities as defined by the Carnegie Foundation for the Advancement of Teaching--GIT and UGA. The Chronicle (9/6/89) defines a leading research institution as one that offers a full range of bachelor's degree programs, is committed to graduate education through the doctoral degree and gives a high priority to research. Each receives at least $33.5 million in federal support and awards at least 50 doctoral degrees annually. Georgia has one selective-admissions liberal arts college, Agnes Scott College.

- For fiscal year 1990, GSU had the second highest amount of state appropriations, $90.1 million; UGA received $184.1 million, and GIT, $79.9 million. When state appropriations for each institution for fiscal year 1990 was divided by the total credit hours for fiscal year 1989, the resulting ratios showed that GSU ranked sixth of the 34 system institutions, trailing MCG, UGA and GIT.

- The Board of Regents authorized a 15 percent increase in tuition and matriculation fees in fiscal years 1983, 1984 and 1985 in order to have the student contribution account for 25 percent of total General Operations revenue in the Resident Instruction Budget. There was a 12.5 percent increase in fiscal year 1986, an 8.5 percent increase in fiscal year 1987, a 5.7 percent increase in fiscal year 1988 and 4 percent increases in fiscal years 1989 and 1990.

- DeKalb Community College, now called DeKalb College, was absorbed into the University System in fiscal year 1987. Clayton Junior College, now Clayton State College (CSC), expanded into a four-year college in fiscal year 1986.

  State spending on student aid will rise by 12 percent this year and total more than $2 billion. This is up 11.6 percent from 1989 and is the second-highest annual increase in the past decade. The aid will primarily take the form of need-based grants for undergraduates (Chronicle, 2/21/90).

- For the ninth year in a row the national average faculty salary rose at a faster rate than the rate of inflation. According to a survey conducted by the American Association of University Professors reported in the Chronicle (4/18/90), the average college professor will earn $41,650 this year, up 6.1 percent over last year. However, another report shows that these gains are not evenly distributed. The Chronicle (4/25/90) reports that for the seventh straight year engineering professors are earning more than their colleagues in other disciplines.

- Faculty "salary compression"--when pay raises and total compensation for senior professors lag behind those for faculty members of less seniority--is an increasingly widespread problem at the nations colleges and universities. This results when an institution is pressured by economic forces in the academic job market to pay competitive salaries in order to attract and to retain scholars at the lower ranks and then does not have enough money to reward veteran faculty members equally. Cases have been reported where this results in heightened tension between academic departments and in low faculty morale. Senior professors are disgruntled on their own campuses but are less likely to be hired elsewhere because of their age. Salary compression is most often found in hard-to-hire fields such as accounting and physics, but is also reported to happen in less-competitive disciplines such as the social sciences and the humanities (Chronicle, 10/18/89).

Implications

- System tuition and fee increases could negatively impact enrollments at system institutions.
- System monitoring of declining enrollments and productivity could result in some institutional closure or consolidation and program phase-out within the system that could affect GSU.
- Continued enrollment-driven funding could have grave implications for those institutions that have experienced severe enrollment declines or have high percentages of part-time students and therefore a disproportionately low FTE relative to faculty and program costs.
- GSU has been lagging behind some competing system institutions in state appropriations percentage growth.

Significant Opportunities

- GSU can build upon its reputation for academic excellence, quality faculty, and the popularity of its business, information systems and health sciences programs for recruitment and fund raising.
- The system's emphasis on sharing satellite centers among institutions and on using new telecommunications technologies affords GSU opportunities for expanding its educational service delivery.
- Given the increasing imposition of regulations and requirements from state and regional governing agencies, institutions should retain control of their destinies by actively defining and redefining purposes, assessing results, and making plans and improving programs based on these definitions and assessments.

Potential Problems

If state appropriations for GSU do not keep pace with those of GIT, UGA, KSC, MCG and Southern College of Technology (SCT), this could put GSU at a competitive disadvantage.

- Increasing government attention on institutional effectiveness or outcome may result in increasing tension between individual institutions and state, regional and federal regulatory agencies. This could threaten institutional autonomy and perhaps lower productivity by requiring additional reams of paperwork.

Competitive Environment

The competitive environment encompasses those educational institutions that compete for students in GSU's prime market. The Atlanta metropolitan area supplies more than one-third of the University System's students. Although GSU dominates system enrollment from metropolitan Atlanta, particularly DeKalb and Fulton counties, UGA draws heavily from this market. Other system institutions that draw on the Atlanta area include GIT, WGC, DKC, CSC, SCT and GSC. GSU is also the strongest magnet for transfer students among system institutions.

GSU is an inexpensive, comprehensive urban institution that provides a variety of quality, flexible academic programs. It is uniquely geared to serve the needs of traditional students and the large number of older, nontraditional working students who live in an economically dynamic and growing metropolitan area. GSU is well-positioned to weather the competitive storm by enhancing its public image, by forging strong ties to the business and government communities, and by increasing its sensitivity to the educational needs of its constituents. Supporting items of information on trends and implications of GSU's competitive environment follow.

Major Trends

Students Within the System from Atlanta MSA

- GSU receives more than 40 percent of the 49,000 system students from the area composed of DeKalb, Cobb, Gwinnett, Clayton and Fulton counties. UGA receives the largest number of system students from Walton, Spalding and Barrow counties, and receives the second largest number from Fulton, Gwinnett and Cherokee. KSC is first in Cherokee, Cobb and Paulding counties. Other colleges first in remaining MSA counties--WGC, CSC and Gainesville College (GVC). More blacks from the Atlanta MSA attend GSU than any other system institution.

- Based on academic background and residential location, GSU students are often predicted to attend KSC, Atlanta Metropolitan College (AMC), CSC and GVC. GSU often enrolls students from other system institutions' prime markets. System institutions that draw heavily on GSU's prime market are UGA, WGC, SCT and GSC, perhaps partially due to GSU's lack of residential facilities. KSC, AMC and CSC do not draw heavily on GSU's market.

- According to a 1987 institutional research report, the Atlanta metropolitan area supplied more than one-third of the almost 150,000 system students. Most system students from the

Atlanta area who enrolled in undergraduate and graduate courses, but not in a degree program, attended GSU.

- In that report, both GSU and UGA received a substantial number of freshmen from Fulton and DeKalb counties. More system freshmen were from Cobb County than any other county. For Cobb freshmen, GSU was fifth after KSC, UGA, WGC and SCT. More than 60 percent of Clayton County freshmen attended CSC.

- According to the 1987 figures, GSU and UGA dominated the Atlanta area market for sophomores from Fulton, DeKalb and Gwinnett counties. GSU dominated the market for Developmental Studies, transfer and graduate students. GSU received 60 percent to 90 percent of the graduate students from most metropolitan area counties.

- In 1987, GSU was successful in enrolling freshmen from high schools in the Atlanta area, in central DeKalb County and in west Gwinnett County. UGA received large enrollments from east Cobb, north Fulton and north DeKalb counties. KSC enrolled freshmen mostly from Cobb County high schools, and CSC from Clayton County high schools. UGA, GIT, GSC and WGC enroll freshmen from most of the large high schools throughout the state.

Student Transfers Within the System

- GSU is the strongest magnet for attracting transfer students, receiving 2,970 students in fiscal year 1989. UGA is second in this field, with 2,412. KSC and DKC come next, with 1,507 and 1,424, respectively.

- Since 1987, DKC has sent more transfer students to GSU than any other system institution. For the past three years, DKC's offering has comprised more than one-third the total number of transfers to GSU and more than double the number sent by UGA, the next highest source of transfers.

- In fiscal year 1989, DKC, UGA, CSC and AMC sent more students to GSU than any of the other system institutions. WGC sent an equal number of students to UGA and GSU.

- Nonsystem institutions sending the most students to GSU were the Atlanta campus of Mercer University and Emory University, followed by Auburn University, Clark College, Berry College, the University of Tennessee at Knoxville, Oglethorpe University, the University of Florida, Morehouse College and Florida State University.

- Students transferring from CSC, SCT, GSU, WGC and UGA usually experience a larger increase in grade point average than do

transfer students from other institutions. Students who transfer from GIT experience the greatest increase in GPA.

System Enrollment, Degrees Conferred and Other Student-Related Data

- Overall, Georgia lost 5,428 students to out-of-state educational institutions in 1986-87. Of these, 2,541 attended public four-year colleges and universities, and 2,887 attended private four-year colleges and universities. The state attracted only 4,293 students to its institutions in that year, resulting in a net loss of 1,135 students, according to an NCES survey published in Research in Higher Education (October 1989). Of the 50 states and the District of Columbia, Georgia ranks 12th in the number of students leaving the state to attend another public four-year institution, and 20th in attracting out-of-state students to its public, four-year colleges and universities.

- Compared to residential institutions within the system, GSU exhibited a moderate rate of retention. When compared to nonresidential institutions, however, GSU's retention rates tended to be the highest.

- Based on a model to predict black enrollment at the 29 predominantly white institutions in the system, GSU is the only Atlanta-area institution with a significantly larger number and percentage of black students than expected.

- For the 10-year period from fiscal years 1980 to 1989, total quarter credit hours generated increased 12 percent at GSU, 17 percent at UGA, 7 percent at MCG and 6 percent at GIT.

- Between fiscal years 1980 and 1989, the total number of degrees conferred by system institutions showed a slow, yet steady overall increase. After experiencing a slight drop in 1983, GSU's growth in this area has been steady. GIT's growth pattern was strong, although that institution also experienced declines in degrees conferred in 1985 and again in 1987. UGA has remained stable overall, yet here, too, there were mid-decade fluctuations. WGC continued to experience a decline in degrees conferred that began in the 1970s.

- GSU has a much lower percentage of freshman enrollment compared to total enrollment than does UGA and DKC. GSU has a higher number of black students than any other system institution, and a higher percentage of black students than either UGA or GIT. GSU has a much higher percentage of part-time students compared to UGA and GIT, but ranks behind DKC.

- For fiscal year 1989, GIT entering freshmen had the highest average SAT score (1175). UGA followed with 1013. GSU had 930, North Georgia College (NGC) 914, SCT 896 and KSC 889.

Institutional Characteristics

- In 1987 there were 19 public four-year colleges and universities in Georgia, 30 public two-year colleges, 30 private four-year colleges and universities, 16 private two-year colleges, and 153 vocational institutions. The public two-year colleges comprise 15 University System institutions and 15 state-funded, vocational institutions that offer college-level credit.

- GSU library bookstock holdings are larger than any other system institution except UGA and GIT. In the last five years, GSU has striven to increase its holdings. By fiscal year 1989, GSU had 1,535,309 volumes, compared to 1,611,773 for GIT and 2,788,311 for UGA.

- Fiscal year 1990 resident matriculation fees at GSU compare favorably to other major universities in the system, and are only slightly higher than those of the system senior colleges. Among system universities and senior colleges, only CSC has lower additional mandatory fees than GSU.

- GSU has considerably less space than GIT, UGA and MCG, but more than any of the remaining system institutions. GSU, however, has the highest percentage of general classroom usage among system universities.

- GIT and UGA far outpace GSU in research contracts and grants received. In fiscal year 1989, GSU received 5.9 percent of all contracts and grants received by University System institutions, up from 5.2 percent in fiscal year 1988 and from 5.4 percent in fiscal year 1980.

- GSU leads all other system colleges and universities in the number of continuing education programs and participants.

- Comparisons of GSU with other urban universities show GSU to have somewhat high enrollments of graduate students, part-time students, females and minorities, and low enrollments of undergraduate students. GSU is average in expenditures and total enrollment, and high in faculty salaries.

- Public research universities increased their tuition and fees from an average of $549 in 1972-73 to $1,701 in 1987-88, an increase of 210 percent. Increases were highest in the South, from $459 to $1,532, an increase of 234 percent (Grapevine, March 1989).

- GSU is one of several system institutions having rigorous grading practices.

Comparisons with Southern Public Universities

- Library resource information for a group of 27 major Southern, public, doctoral-granting institutions suggests that GSU may be considered average for this group. Library expenditures were 4.4 percent of the total educational and general expenditures at GSU during fiscal year 1987, an amount that is above average for the group.

- GSU's large percentage of part-time students cuts the financial resources available to it to below the average of what is available at similar universities. A higher-than-average overhead for student-related services results when it costs the same to process a part-time student as a full-time student, as it does under GSU's current tuition policy.

- Full-time enrollment for the group of 27 Southern universities increased 7.1 percent from fall 1985 to fall 1989, while part-time enrollment increased 4.6 percent. During that time, GSU experienced increases in full-time enrollment (10.3 percent) and part-time enrollment (3.8 percent).

- For the group of Southern universities, both average academic year undergraduate residential and nonresidential fees rose more than 36 percent between fiscal years 1985 to 1989. Graduate residential and nonresidential fees also increased more than 36 percent during that time. Residential fees increased at a faster rate than nonresidential fees during this period.

- GSU's resident undergraduate fees increased 26.4 percent from fiscal years 1985 to 1989; resident graduate fees increased by 26.1 percent. GSU's resident undergraduate fees were $22 below average for the group for fiscal year 1989, while its resident graduate fees were $422 below the group average.

Implications

- GSU's market strengths in relation to other system institutions are in DeKalb, Fulton, Gwinnett and Rockdale counties. For black students, GSU dominates the Atlanta MSA market.

- GSU may experience increasing competition for enrollments from KSC, GVC, SCT and GIT.

- Slight decreases in degrees conferred may indicate that many students are taking limited courses to advance their career or for personal enrichment rather than pursuing a specific degree program. GIT's increase in degrees conferred indicates an increasing demand for engineering graduates.

- GSU has stronger pulling power for transfers than for freshmen relative to UGA and GIT. GSU also has stronger pulling power for black students compared to other system universities.

- Given the high cost of recruiting, enrolling and retaining transfer students, it becomes increasingly important to consider transfer students in terms of their levels of academic preparedness and the academic demands of each institution.

- GSU tends to get less academically able students than UGA and GIT, which puts GSU at a disadvantage for student retention. GSU must vie with other system four-year colleges for these students.

- GSU is at a disadvantage relative to competing institutions with respect to library facilities, space availability and research grants received.

- GSU is at an advantage relative to competing institutions regarding continuing education programs, student fees, efficiency of space utilization, and program and cost flexibility for part-time and nondegree students.

- GSU's location in the heart of the University System's largest student market provides a strong recruitment advantage relative to other system institutions.

Significant Opportunities

- GSU can pursue the more academically qualified market now captured by GIT and UGA.

- GSU can pursue the student market beyond I-285 now captured by KSC, SCT and UGA, particularly in Cobb County.

- GSU can expand its enrollment by attempting to tap the market of Georgia residents who attend out-of-state institutions of higher education.

- GSU can expand upon its unique programs for providing continuing education and personal enrichment courses for a growing metropolitan area.

- GSU can stress its high quality/low cost advantages in recruitment.

Potential Problems

- As more students take courses for personal enrichment on a nondegree track, university productivity may appear to decrease as the number of degrees conferred decreases.

- GSU's image of deficiencies in facilities and research support could put the university at a competitive disadvantage with other system universities and private universities.

- As other institutions recognize the potential of the Atlanta metropolitan area as a source of students, competition for student recruitment in GSU's prime market is likely to become more intense.

Summary

Universities continue to undergo demands for rapid changes. In a period of shifts in population, economic instability and social change, new strategies for institutional adaptation are required. This report presents and analyzes current environmental trends that affect present and future planning and assessment at GSU. It is a revision and update of a Jean (1986) report on environmental analysis. Major environmental trends and their implications were identified as:

- Macroenvironment: GSU can take advantage of its location in an urban area experiencing dynamic employment and population growth to help offset the potential declining enrollment of traditional college-age students. GSU can benefit from a nationwide interest expressed by government and business leaders in quality education as a fundamental component in strategies to compete in an international economy dependent upon the development of increasingly advanced technology. Higher education is also being viewed as having an integral role in fostering local and state economic development.

- Internal environment: GSU's public image does not reflect its size, quality or influence. Current planning and assessment efforts provide an opportunity to identify its strengths, weaknesses and untapped opportunities and to determine the extent to which its mission is relevant to the changing environment and is reflected in its public image.

- Market environment: GSU traditionally draws many students from the northeast metropolitan Atlanta area. The potential for expanding this market exists through improved retention, the use of satellite locations and recruiting in areas where the university is traditionally weak, such as east Cobb, north Fulton and north DeKalb counties. Scholarships and other incentives are a possible way of recruiting beginning students that do not currently seriously consider enrolling.

- Public environment: The strong emphasis from the state on the need to evaluate and assess institutional effectiveness, educational outcomes and program efficiency is unlikely to abate. This initiative can be used as an opportunity to explore goals and objectives, to assess educational results, and to make plans and improve programs based on these assessments. The university is likely to continue to have to compete vigorously for its fair share of public funds.

- Competitive environment: The Atlanta metropolitan area supplies more than one-third of the University System's students. GSU dominates system enrollment from this area, but other system institutions draw heavily from this market. Although it should be wary of increasing competition from these institutions, it can maintain its competitive advantage by enhancing its public image, by increasing its sensitivity to the needs of its constituents, and by forging strong ties to the business and government constituencies.

GSU is in an excellent position to navigate successfully the potentially difficult course facing higher education during the 1990s. Historically, it has been an inexpensive, comprehensive urban institution providing a variety of superior, flexible academic programs. Because it is the only such institution in the University System, the university is in a unique position to serve the needs of both traditional students and the large number of older, nontraditional working students in the Atlanta metropolitan area. By becoming more sensitive to changing environmental trends that affect its student, business, political and community constituencies, the university can incorporate environmental issues into its strategies and plans. As such, it can better orchestrate its own future, carefully balancing environmental constraints and market opportunities with institutional values and goals.

Glossary

Atlanta Metropolitan Statistical Area (MSA): The 18-county metro area comprise Barrow, Butts, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette Forsyth, Fulton, Gwinnett, Henry, Newton, Paulding, Rockdale, Spalding an Walton counties.

Atlanta Region: As defined by the Atlanta Regional Commission, it comprises Clayton Cobb, DeKalb, Douglas, Fulton, Gwinnett, Henry and Rockdale counties.

	INSTITUTION	PREVIOUS NAME
GIT	Georgia Institute of Technology	
GSU	Georgia State University	
MCG	Medical College of Georgia	
UGA	University of Georgia	
ALS	Albany State College	
ARS	Armstrong State College	
AUG	Augusta College	
CSC	Clayton State College	Clayton Junior College
COL	Columbus College	
FVS	Fort Valley State College	
GAC	Georgia College	
GSC	Georgia Southern College	
GSW	Georgia Southwestern College	
KEN	Kennesaw State College	Kennesaw College
NGC	North Georgia College	
SSC	Savannah State College	
SCT	Southern College of Technology	
VSC	Valdosta State College	
WGC	West Georgia College	
ABC	Abraham Baldwin Agricultural College	
AMC	Atlanta Metropolitan College	Atlanta Junior College
BAC	Bainbridge College	Bainbridge Junior College
BRC	Brunswick College	Brunswick Junior College
DAL	Dalton College	Dalton Junior College
DAR	Darton College	Albany Junior College
DKC	DeKalb College	DeKalb Community College
EGC	East Georgia College	Emanuel County Junior College
FLC	Floyd College	Floyd Junior College
GVC	Gainesville College	Gainesville Junior College
GOC	Gordon College	Gordon Junior College
MAC	Macon College	Macon Junior College
MGC	Middle Georgia College	
SGC	South Georgia College	
WCC	Waycross College	Waycross Junior College

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